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Application Designer - Untitled - RC CASE_HD.ENG(Page)

File Edit View Insert Build Debug Tools Layout Go Favorites Window Help

610

RC CASE_HD.ENG (Page)

660

620

640

650

Ready

Build Find Object References Upgrade Results Validate

Summary: Description: Summary: Asset Tag: Product:

Alt. Contact: Preferred Contact Method: Email Type: Phone Type: Department: Name:

Business Unit: Location: Phone: Email: Preferred Contact Details:

Installed

NUM

FIG. 6

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Administer Personalization Opt-Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Reload Search Favorites History Bookmarks Address Bar

Address http://localhost:7001/serlets/jsp/serlets/peoplesoft/ps/psstart

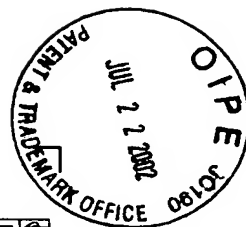
Home View Worklist Help Sign Out

Administer Configuration Options

| Option | Description | Image | Enable Option | Allow User Value | Default Value |
|---------|-------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|---------------|
| ACCESS | Accessibility Features | 820 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | N |
| ADBTN | Tab over Add/Del Buttons(+/-) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | N |
| ADES | Afternoon designator (PM, pm) | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | PM |
| CALBTN | Tab over Calendar Button | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| CSYM | Currency Symbol | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$ |
| CSYM | Currency Symbol | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | L |
| DCSP | Decimal Separator | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | . |
| DFRMT | Date Format | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | M |
| EXPENT | Expert Entry | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | N |
| GRDIAB | Tab over Grid Tabs | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| HDRICN | Tab over Header Icons | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| LKPBTN | Tab over Lookup Button | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| LITZONE | Local Time Zone | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | PST |
| MDES | Morning designator (AM, am) | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | AM |

Local intranet

FIG. 8



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1010

1020

1005

270

Home>PeopleTools>Maintain Security>Use>My Profile

General Profile Information

Opriid for CRM/SKT, CRM/QABAK

Password

Change password

Change or set up forgotten password help

Personalization

Changes to Personalization settings require you to log off and log back on in order to take effect.

My preferred language for reports and email is: English

Currency Code: ☐ ☒

Set Personalizations

Email

Email Address:

Alternate User

If you will be temporarily unavailable, you can select an alternate user to receive your mailings.

Alternate User ID:

From Date: (example: 12/31/2000)

To Date: (example: 12/31/2000)

Miscellaneous User Links

Home View Worklist Help Sign Out New Window

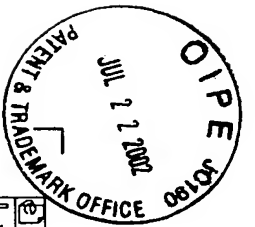
File Edit View Favorites Tools Help

Back Forward Search Favorites History Home

Address http://localhost:7001/serietls/clientserietls/peopletools/?cmd=alarak

Local intranet

FIG. 10A



Administer Personalization Opt-Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Search Favorites History Home W A B

Address http://localhost:7001/series/iclientseries/peoplesoft/?cmd=startx

Home>PeopleTools>Maintain Security>Use>My Profile

PEOPLE SOFT

Home View Worklist Help Sign Out

New Window

Personalization

| Option | Default Value | Override Value |
|-------------------------------|--------------------------|----------------------------------|
| Accessibility Features | No | <input type="checkbox"/> Explain |
| Afternoon designator (PM, pm) | PM | <input type="text"/> Explain |
| Currency Symbol | \$ | <input type="text"/> Explain |
| Currency Symbol Position | Leading | <input type="text"/> Explain |
| Decimal Separator | . | <input type="text"/> Explain |
| Date Format | MM/DD/YY | <input type="text"/> Explain |
| Date Separator | / | <input type="text"/> Explain |
| Local Time Zone | Pacific Time, Tijuana | <input type="text"/> Explain |
| Morning designator (AM, am) | AM | <input type="text"/> Explain |
| Multiple Row Insert | <input type="checkbox"/> | <input type="checkbox"/> Explain |
| Save Configuration | Yes | <input type="checkbox"/> Explain |
| Save Warning | Yes | <input type="checkbox"/> Explain |
| Time Format | h:mm:ss(8:05 AM) | <input type="text"/> Explain |
| Time Separator | : | <input type="text"/> Explain |
| Thousand Separator | , | <input type="text"/> Explain |
| Use Local Timezone | Yes | <input type="checkbox"/> Explain |

FIG. 10B



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Application Designer-Untitled-Rc CASE_HD ENG(Page)

File Edit View Insert Build Debug Tools Layout Go Favorites Window Help

RC_CASE_HD ENG (Page)

Page Designer Order 1220 1230 1240 1240

1250

1210A

1210B

1210J

1210K

1210R

1210Z

| Lvl | Label | Type | Field | Record | Display Control | Related Field | Control Field | Page Field No. |
|-----|-------|---------------------|---------------|--------------|-----------------|---------------|---------------|----------------|
| 1 | 0 | SubPage | EMP_INFO_GBO | DERIVED_RC_C | | | | |
| 2 | 0 | Employee Informa | EMPLID | DERIVED_RC_C | | | | CUST_INFO_I |
| 3 | 0 | EMPLID | EMPLID | DERIVED_RC_C | | | | |
| 4 | 0 | ContactID | CASE_CONTACT | RC_CASE | | | | |
| 5 | 0 | Name | NAME_SEARCH | DERIVED_RC_C | | | | |
| 6 | 0 | PersonID | PERSON_ID | RC_DRILLDOWN | | | | |
| 7 | 0 | Business Unit | RC_BU_DESCR | DERIVED_RC_C | | | | |
| 8 | 0 | Business Unit | BUSINESS_UNIT | RC_CASE | | | | |
| 9 | 0 | Department | DEPTD | RB_WORKER | | | | 4 |
| 10 | 0 | Location Code | LOCATION | RB_WORKER | | | | 4 |
| 11 | 0 | Phone Type | PHONE_TYPE | DERIVED_RC_C | | | | |
| 12 | 0 | Phone Type | PHONE_TYPE | RC_CASE | | | | |
| 13 | 0 | Business Unit | BUSINESS_UNIT | DERIVED_RC_C | | | | |
| 14 | 0 | Phone | PHONE | DERIVED_RC_C | | | | |
| 15 | 0 | Extension | EXTENSION | DERIVED_RC_C | | | | |
| 16 | 0 | Email Type | E_ADDR_TYPE | DERIVED_RC_C | | | | |
| 17 | 0 | Email Type | E_ADDR_TYPE | RC_CASE | | | | |
| 18 | 0 | Email | EMAIL_ADDR | DERIVED_RC_C | | | | |
| 19 | 0 | Preferred Contact | RC_CONTACT_M | RC_CASE | | | | |
| 20 | 0 | Preferred Contact | RC_CONTACT_I | DERIVED_RC_C | | | | |
| 21 | 0 | Contact Details | RC_CONTACT_I | RC_CASE | | | | |
| 22 | 0 | Contact | CONTACT_ID | RC_CASE | | | | 22 |
| 23 | 0 | Alt Contact | ALT_NAME_SEA | RC_ALT_CNTC | | | | |
| 24 | 0 | Problem Information | PROBLEM_INFO | DERIVED_RC_C | | | | PROBLEM_IN |
| 25 | 0 | Product | RC_PRODUCT_I | DERIVED_RC_C | | | | |
| 26 | 0 | Product | PRODUCT_ID | RC_CASE | | | | |

Build Find Object References Upgrade Results Validate

Ready

C8800CA NUM

FIG. 12

1200

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1310

1340

1350

255

PEOPLE

Address Info

Address Seq: 1

Address Detail

*Effective Date: 07/25/2001

*Address Type: Business

Description: USA United States

Address 1: Peoplesoft Parkway

Address 2:

Address 3:

City: Pleasanton

County:

State: CA California

Time Zone: PST Pacific Time, Tijuana

Last Modified: 07/25/2001 2:36PM PDT VP1

*Status: Active

*Address ID: 1208

1320

1330

1335

Submit

Phone Info

*Phone Type Description Primary Int'l Telephone

Business Desk 001 925 694 9479

View All First Last

Done

local intranet

FIG. 13A



Administer Personalization Opt-Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Search Favorites History Home View Worklist Help Sign Out

Address: http://localhost:7001/serbia/culibernet/peoplesoft/?cmd=start

PEOPLE

Address Info View All First 1 of 1 Last

*Address Seq: 1 1360 + -

Address Detail View All First 1 of 1 Last

*Effective Date: 07/25/2001 1320 *Status: Active + -

*Address Type: Business 1320 *Address ID: 1208 1330

Description: 1340

Country: USA 1350 United States

Address 1: Peoplesoft Parkway

Address 2:

Address 3:

City: Pleasanton

Country: CA 94505

State: CA California

Time Zone: PST Pacific Time, Tijuana

Last Modified: 07/25/2001 2:36PM PDT VP1 1335

Submit

Phone Info View All First 1 of 1 Last

| *Phone Type | Description | Primary | Int'l Prefix | Telephone | Phone Extension |
|-------------|-------------|-------------------------------------|--------------|--------------|-----------------|
| Business | Desk | <input checked="" type="checkbox"/> | 001 | 925 694 9479 | + - |

Done Local intranet

FIG. 13B



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1310

| Address Detail | |
|------------------|--------------------|
| *Effective Date: | 07/25/2001 |
| *Address Type: | Business |
| Description: | |
| Country: | USA United States |
| Address 1: | Peoplesoft Parkway |
| *Status: | |
| *Address ID: | |

FIG. 13C

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Administer Personalization Opt-Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites History Home View Worklist Help Sign Out

Address: http://localhost:7001/services/identity/peopleinfo/?cmd=static

PEOPLE

Address Info View All First 1 of 1 Last

*Address Seq: 1

Address Detail View All First 1 of 1 Last

*Effective Date: 07/25/2001

*Status: Active

*Address Type: Business 1320 *Address ID: 1208 1330

Description: 1340

Country: USA United States 1350

Address 1: Peoplesoft Parkway

Address 2:

Address 3:

City: Pleasanton

State: CA California

Postoi: 94505

Time Zone: PST Pacific Time, Tijuana

Last Modified: 07/25/2001 2:36PM PDT VP1 1335

Submit

Phone Info View All First 1 of 1 Last

*Phone Type Description Primary Prefix Int'l Telephone Phone Extension

Business Desk 001 925 694 9479 + -

Done Local intranet

FIG. 130

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Self Service User Profile - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites History Home W Y A B

Address http://localhost:7001/services/calendarsite/peopleinfo/?cmd=start

Home>PeopleTools>Maintain Security>Use>My Profile

PERSONALIZATION

Option Default Value Override Value

| | | |
|--------------------------------|-----------------------|---------------------------------------------|
| Accessibility Features | No | <input checked="" type="checkbox"/> Explain |
| Tab over Add/Del Buttons (+/-) | No | <input checked="" type="checkbox"/> Explain |
| Afternoon designator (PM, pm) | PM | <input checked="" type="checkbox"/> Explain |
| Tab over Calendar Button | No | <input checked="" type="checkbox"/> Explain |
| Currency Symbol | \$ | <input checked="" type="checkbox"/> Explain |
| Currency Symbol Position | Leading | <input checked="" type="checkbox"/> Explain |
| Decimal Separator | MM/DD/YY | <input checked="" type="checkbox"/> Explain |
| Date Format | / | <input checked="" type="checkbox"/> Explain |
| Date Separator | Pacific Time, Tijuana | <input checked="" type="checkbox"/> Explain |
| Local Time Zone | AM | <input checked="" type="checkbox"/> Explain |
| Morning designator (AM, am) | Yes | <input checked="" type="checkbox"/> Explain |
| Multiple Row Insert | Yes | <input checked="" type="checkbox"/> Explain |
| Save Configuration | Yes | <input checked="" type="checkbox"/> Explain |
| Save Warning | Yes | <input checked="" type="checkbox"/> Explain |
| Time Format | h:mm:ss(8:05 AM) | <input checked="" type="checkbox"/> Explain |
| Time Separator | : | <input checked="" type="checkbox"/> Explain |
| Thousand Separator | | <input checked="" type="checkbox"/> Explain |

1370

Home View Worklist Help Sign Out

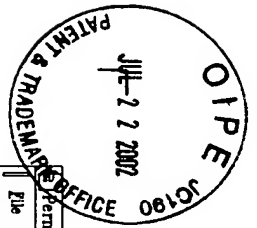
New Window

Load intranet

FIG. 13E

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Technology Center 2:30



Handwritten annotations in red ink highlight specific menu names and their corresponding edit components, with arrows pointing to the relevant rows in the table.

| Menu Name | Edit Components | Edit Components |
|-------------------------------|-----------------|-----------------|
| ADMINISTER_SECURITY | + | + |
| APPLICATION_ENGINE | - | - |
| APPMONITOR | + | + |
| CALLCENTER | + | + |
| CIC_PAGELETS | + | + |
| CONV_SCHEMA_MAP | + | + |
| CRM_OPEN_WORKLIST | + | + |
| CRM_PORTAL_COMPONENTS | + | + |
| CRM_TRANSFORM_UTLITY | + | + |
| CTL_CONFIGURATION | + | + |
| CUBE_MANAGER | + | + |
| EDI_MANAGER | + | + |
| ESTABLISH_BUSINESS_UNITS | + | + |
| MAINTAIN_PRODUCT_CONFIGURATOR | + | + |
| MAINTAIN_SECURITY | + | + |
| MAINTAIN_SOLUTION | + | + |

FIG. 14A



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FIG. 14B

1470

Grid Properties

General Columns Label Use

General Attributes

Main Record: PSACLMEMU

Page Field Name PSACLMEMU

Occurs Level: 1

Occurs Count: 15 1480

☒ Unlimited Occurs Count (rows) 1490

OK Cancel

270



FIG. 14C

225

1410
1420A
1420B
1420P
1420Q

PEOPLE
2000

Home PeopleTools Maintain Security/Use Permission Lists New Window

General Pages PeopleTools Process Sign-on Times (D)

Permission List: ALLPANLS
Description: All Panels

| Menu Name | Edit Components | |
|--------------------------------|-----------------|-----|
| ADMINISTER_SECURITY | Edit Components | + - |
| APPLICATION_ENGINE | Edit Components | + - |
| APPMONITOR | Edit Components | + - |
| CALLCENTER | Edit Components | + - |
| CIC_PAGELETS | Edit Components | + - |
| CIV_SCHEMA_MAP | Edit Components | + - |
| CRM_OPEN_WORKLIST | Edit Components | + - |
| CRM_PORTAL_COMPONENTS | Edit Components | + - |
| CRM_TRANSFORM_UTILITY | Edit Components | + - |
| CTI_CONFIGURATION | Edit Components | + - |
| CUBE_MANAGER | Edit Components | + - |
| EDI_MANAGER | Edit Components | + - |
| ESTABLISH_BUSINESS_UNITS | Edit Components | + - |
| MAINTAIN_PRODUCT_CONFIGURATOR | Edit Components | + - |
| MAINTAIN_SECURITY | Edit Components | + - |
| MAINTAIN_SOLUTION | Edit Components | + - |
| MANAGE_INTEGRATION_RULES | Edit Components | + - |
| MASS_CHANGE | Edit Components | + - |
| MISSION | Edit Components | + - |
| PORTAL_ADMIN | Edit Components | + - |
| PORTAL_COMPONENTS | Edit Components | + - |
| PORTAL_PERS_HOMEPAGE | Edit Components | + - |
| PROCESSMONITOR | Edit Components | + - |
| PROCESS_SCHEDULER | Edit Components | + - |
| QUERY_MANAGER | Edit Components | + - |
| RA_CAMPAIGN_MANAGEMENT | Edit Components | + - |
| RA_CM_STRUCTURE | Edit Components | + - |
| RB_DEFINE_PRODUCTS | Edit Components | + - |
| RB_GENERAL_OPTIONS | Edit Components | + - |
| RB_INTEGRATION_OPTIONS | Edit Components | + - |
| RB_MANAGE_COMPETENCIES | Edit Components | + - |
| RB_MANAGE_CUSTOMER_INFORMATION | Edit Components | + - |
| RB_MANAGE_WORKFORCE | Edit Components | + - |
| RB_PROCESS_INBOUND_TRANS | Edit Components | + - |
| RB_STRUCTURE_SEARCHING | Edit Components | + - |
| RB_WORKER_CALENDAR | Edit Components | + - |
| RC_SELF_SERVICE | Edit Components | + - |
| RC_SOLN_MGMT | Edit Components | + - |
| REPORT_BOOKS | Edit Components | + - |
| REPORT_MANAGER | Edit Components | + - |
| RF_AGREEMENTS | Edit Components | + - |
| RF_DEFINE_ITEMS | Edit Components | + - |
| RF_DEFINE_ITEM_CONTROLS | Edit Components | + - |
| RF_MAINT_ENTITLEMENTS | Edit Components | + - |
| RF_MANAGE_RMA | Edit Components | + - |
| RF_SERVICE_ORDER | Edit Components | + - |
| RF_STRUCTURE | Edit Components | + - |
| RI_CIC_HOME | Edit Components | + - |
| RI_INTERACTION | Edit Components | + - |
| RI_SETUP | Edit Components | + - |
| RM_DELTA_UTILITY | Edit Components | + - |
| RSF_FORECAST | Edit Components | + - |
| RSF_LEADS | Edit Components | + - |
| RSF_OPPORTUNITY | Edit Components | + - |
| RSF_PRTL | Edit Components | + - |
| RSF_SETUP_TABLES | Edit Components | + - |
| RSF_TERRITORY | Edit Components | + - |
| STRUCTURE_PROCESS_AUTOMATION | Edit Components | + - |
| STRUCTURE_RC | Edit Components | + - |
| TRANSLATE | Edit Components | + - |
| EDI_MANAGER | Edit Components | + - |
| TREE_MANAGER | Edit Components | + - |
| UTILITIES | Edit Components | + - |
| WORKFLOW_ADMINISTRATOR | Edit Components | + - |
| WORKLIST | Edit Components | + - |

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FIG. 17A

275

Component Properties

General Use Internet

Search Page

Primary Action ☐ New ☒ Search

Default Search Action: Update Display

Default Search/Lookup Type: ☒ Basic ☐ Advanced

☒ Allow Action Mode Selection

Link To Access Add Page-- Message Set/Nbr: 124 62

Link To Access Search Page-- Message Set/Nbr: 124 63

Instructional Text-- 1710 Message Set/Nbr: 124 50

Multi-Page Navigation

☒ Display Folder Tabs (top)

☒ Display Hyperlinks (bottom)

Processing Mode

☒ Interactive ☐ Deferred

☒ Allow Expert Entry 1730

Toolbar

Selected Toolbar Actions: 1720

☒ Save

☐ Return to List

☐ Next in List

☐ Previous in List

☐ Next Page in Component

☐ Previous Page in Component

☒ Refresh

☒ Disable Toolbar:

☐ View Worklis

☐ Next in WorkList

☐ Previous in WorkList

☐ Add

☐ Update/Display

☐ Update/Display All

☐ Correction

1740

OK Cancel



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FIG. 17B

255

Person Component - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <http://localhost:7001/serfela/cilienterml/peoplesoft8/?cmd=start&>

Search History Favorites Home View Worklist Help Sign Out

PEOPLE SOFT

Address Info View All First 1 of 1 Last

*Address Seq: 1

Address Detail View All First 1 of 1 Last

*Effective Date: 07/25/2001

*Status: Active

*Address Type: Business

*Address ID: 1208

Description:

Country: USA United States

Address 1: Peoplesoft Parkway

Address 2:

Address 3:

City: Pleasanton

County:

State: CA California

Postal: 94505

Time Zone: PST Pacific Time, Tijuana

Last Modified: 07/25/2001 2:36PM PDT VP1

Submit

Expert Entry 1760

Phone Info View All First 1 of 1 Last

*Phone Type Description Primary Prefix Int'l Telephone Phone Extension

Business Desk [x] [001] [925 694 9479]

Done Local intranet